

ProjectWise Deliverables Management Workflow

NOTE:

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI = Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

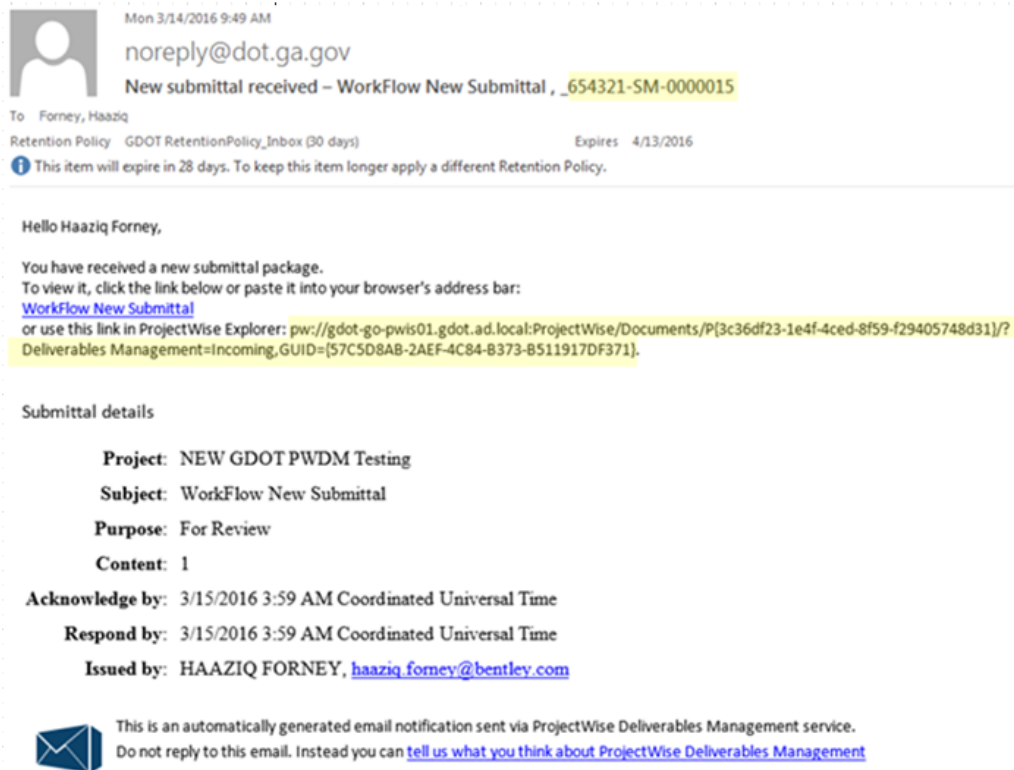
Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

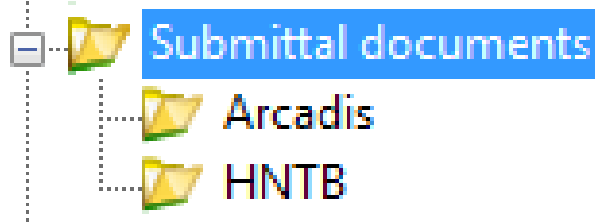
Remember: The sending user issues a **Transmittal**, and the receiving user receives a **Submittal**.

GDOT Participants – Respond to Submittals

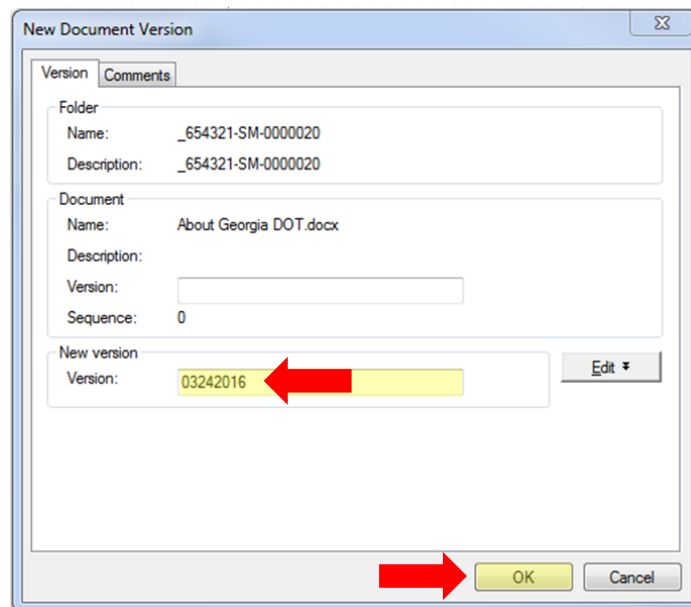
1. When receiving submittals, you will be notified via Microsoft Outlook that a new submittal package has been received.
2. To open the package from the email notification, copy/paste the link next to **“Or use this link in ProjectWise Explorer”** into **ProjectWise Explorer’s** address bar and press enter. Notice the unique submittal ID at the top (ie: **_654321-SM-0000015**).



3. The new submittal package will be highlighted. Click the link to the package.
4. From the **General** tab, review the cover letter to verify expected contents by clicking on the cover letter PDF hyperlink.
5. In the bottom right corner of the dialogue box, **Acknowledge** the package. This will import all files to the ProjectWise Client into the project's pre-configured folder for the organization that sent the package.

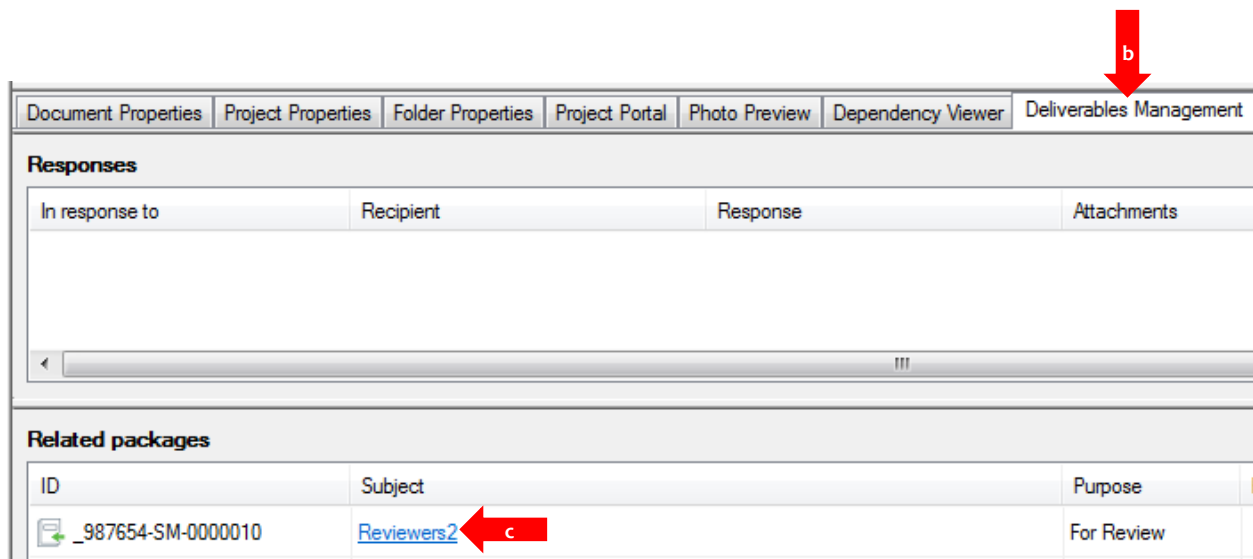


6. To easily navigate to the folder containing the files, click on the **Documents** tab and click on the **Go To Folder** button in the bottom right corner.
7. In the submittal folder, select all files, right-click, select **New→Version**. Enter current date as the version name: **03242016**, click **Ok**. This step will keep the original submitted files intact.




NOTE: For information on sending to internal additional reviewers, please see the document *2a_GDOT_Additional Internal Reviewers.pdf*.

8. Perform a detailed review by opening the new versioned files from the submittal folder and begin commenting or marking up the file(s). Be sure to Check-In your file(s) when exiting so your comments are saved within the document.
9. To navigate back to the package:
 - a) Select any of the READ-ONLY versions (📖) of the files associated with this package.
 - b) Click on the **Deliverables Management** tab in the window at the bottom of the screen.
 - c) Click on the *Subject* link in the **Related packages** window.

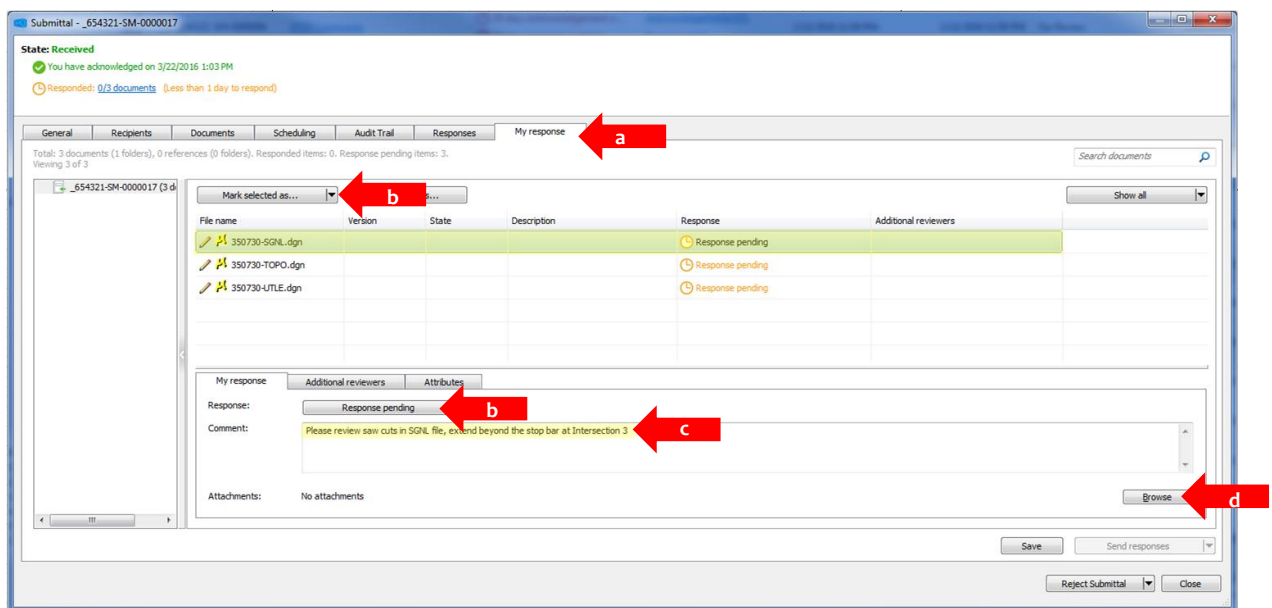


The screenshot displays the 'Deliverables Management' tab in a software interface. The 'Responses' section is currently empty. Below it, the 'Related packages' section contains a table with the following data:

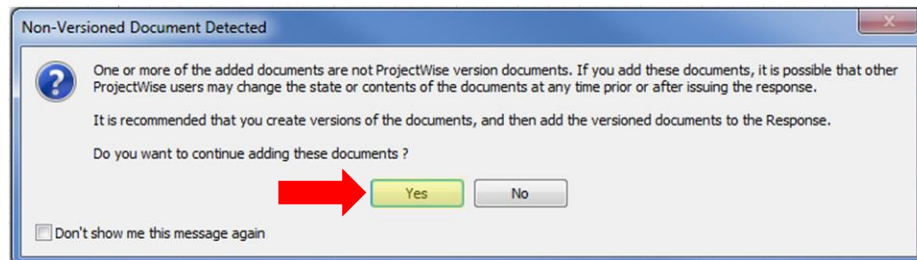
ID	Subject	Purpose
 _987654-SM-0000010	Reviewers2	For Review

Red arrow 'b' points to the 'Deliverables Management' tab. Red arrow 'c' points to the 'Reviewers2' link.

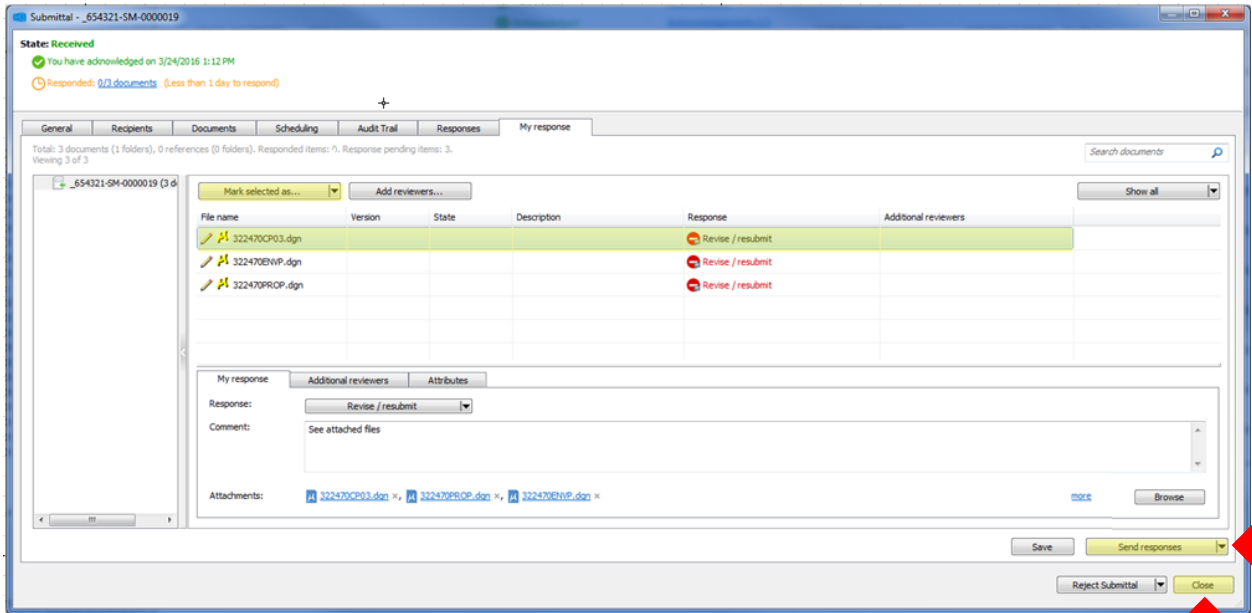
10. Click on the **My Response** tab to begin responding (see dialog below).
- Select a document to respond to. The **My Response** box opens at the bottom. (If there were additional reviewers, you will see their responses already entered and attached.)
 - Select the appropriate **Response** for the document selected. (To select multiple documents with the same response, use the **Mark Selected As** dropdown at the top.)
 - Type a general **Comment** referring the recipient to review the attached document containing comments.
 - Select **Browse** to browse to the submittal folder to select the documents and select **Open** to attach them to the package.




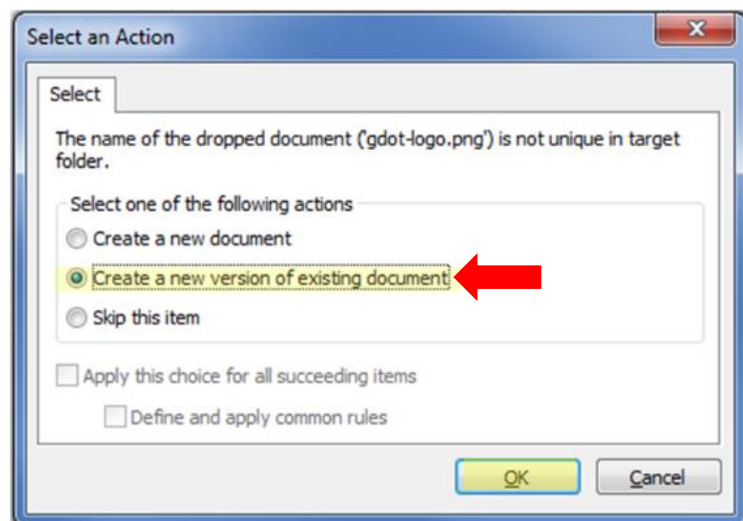
11. When the Non-versioned Document dialog appears, click **Yes**.



12. Perform these steps (Step 10) for all files. Once complete, send the response.
 - a. When all documents are marked with the appropriate response, select **Send Responses**.
 - b. Click **Close**.



13. After a detailed review has been completed and the response sent, navigate to the company submittal folder and select all the editable files (ones with pencil  beside them) associated with this submittal and right-click and select **Cut**.
14. Navigate to the appropriate folder under the standard folder structure where the files should reside and right-click and select **Paste**.
15. When prompted whether to move documents here, select **Yes**. Versions will be brought along with the files by selecting **Yes** when prompted to attach versions.
16. If prompted with the **"Select an Action dialogue box"**, choose Create a **New Version of Existing Document**. Click **Ok**.



17. Enter current date as the version name. Click **Ok**.

